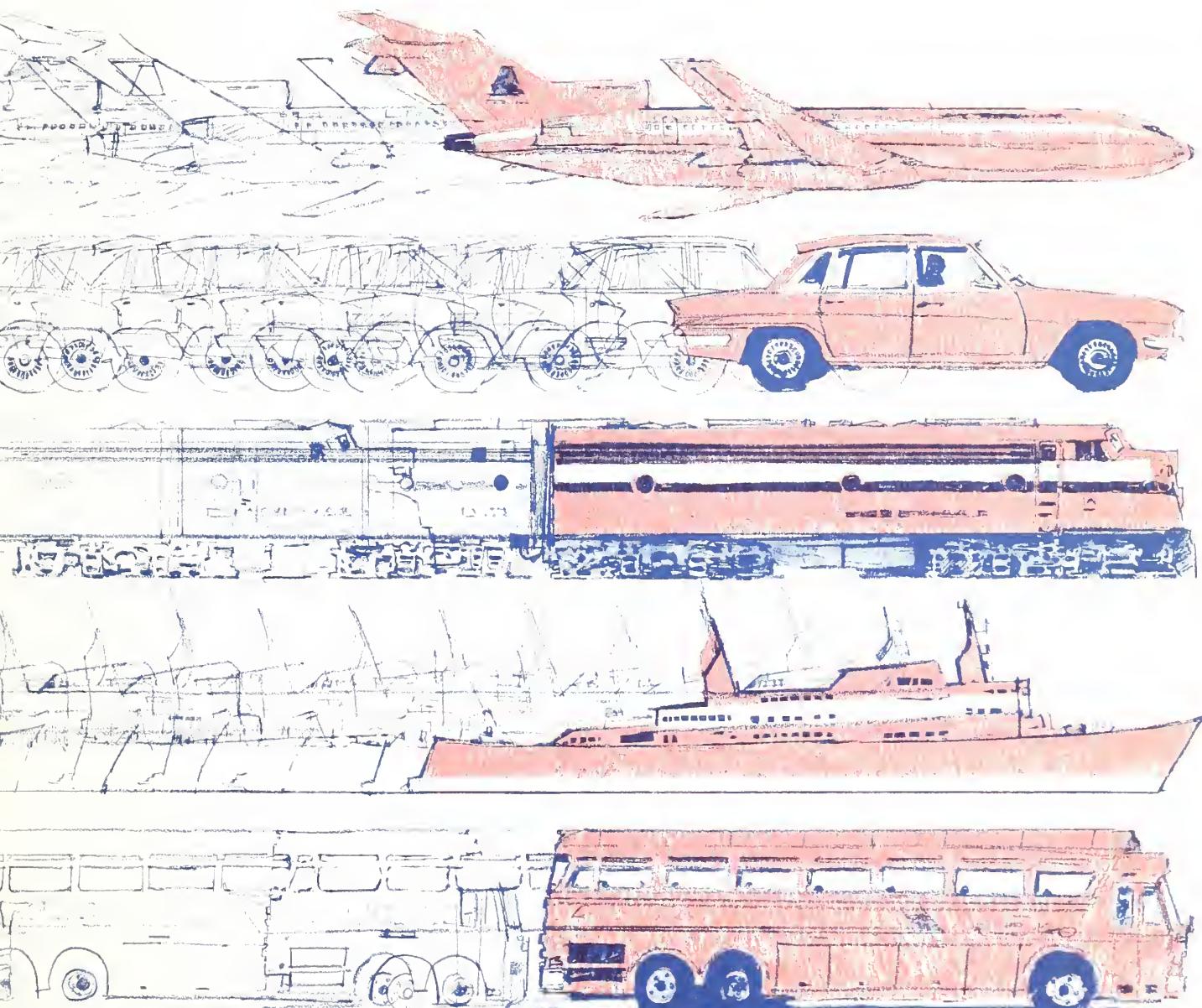


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1973: Tourism **Action** Year



United States Travel Service
U.S. DEPARTMENT OF COMMERCE





**The President
President of the Senate
Speaker of the House of Representatives**

Sirs:

I have the honor to submit herewith the Eighteenth Program Report of the activities of the United States Travel Service, U.S. Department of Commerce, for calendar year 1973, in compliance with Section 5 of the International Travel Act of 1961, as amended (22 USC 2121-2127).

Respectfully submitted,

A handwritten signature in blue ink, appearing to read "James B. DeLoach, Jr."

Secretary of Commerce

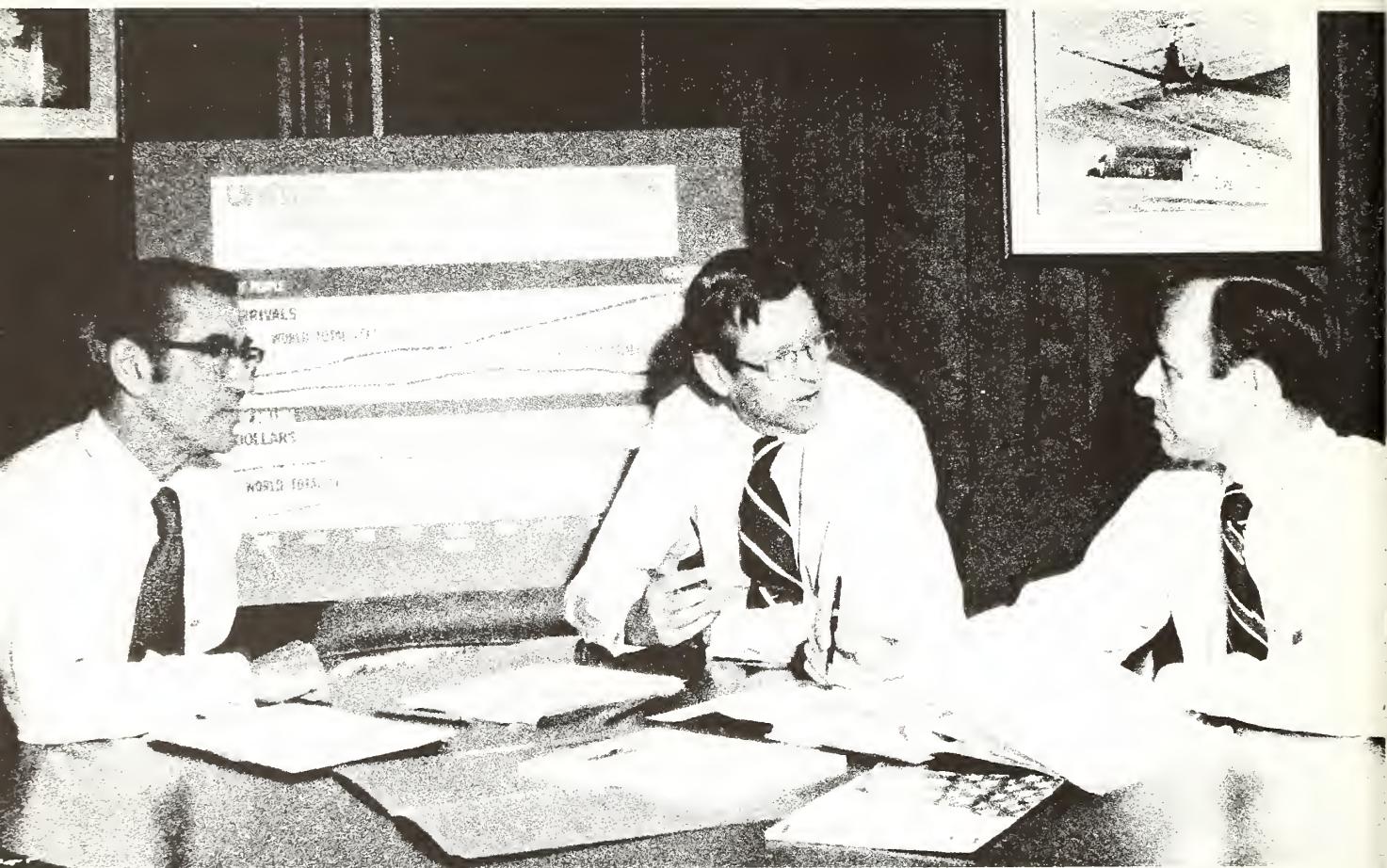
1973: Tourism Action Year

**18th Program Report of
the United States Travel Service**

**Annual Report of the
Secretary of Commerce
January-December 1973**

**U.S. Department of Commerce
Frederick B. Dent, Secretary**

**United States Travel Service
C. Langhorne Washburn
Assistant Secretary for Tourism**



USTS MANAGEMENT TEAM—(l-r)
Will Arey, Executive Director; C.
Langhorne Washburn, Assistant
Secretary of Commerce for Tourism;
and Michael Miller, Deputy Assistant
Secretary of Commerce for Tourism.

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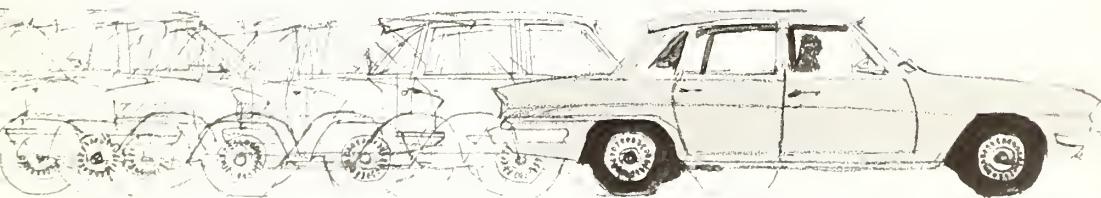
1973: TOURISM ACTION YEAR

by
C. Langhorne Washburn
Assistant Secretary of Commerce
for Tourism

“**A**ction” is the most suitable word to describe this important tourism year, both in terms of implementation of United States Travel Service programs and of the United States' rapidly growing popularity as a destination among the world's travelers.

More than 14 million international visitors entered the USA in 1973, a 6.9 per cent increase over 1972's 13.1 million arrivals. These visitors spent \$3.9 billion in our Nation this year, up from \$3.2 billion the preceding year. It has been estimated that earnings from international travel, considering the multiplier effect in the economy, provide 270,000 Americans with jobs.

As encouraging as these figures are to those of us concerned about our Nation's balance of payments deficit, they must be viewed in relation to the continuing flow of American tourists and tourism dollars abroad. In 1973, an estimated 24.8 million Americans traveled to other nations and spent an estimated \$6.9 billion. In comparison, 23 million Americans toured abroad in 1972, spending \$6.4 billion.



USTS' action this year was based on the operational framework provided by the Integrated Marketing Plan and Measurement System, implemented early in the year. The plan focused all USTS efforts toward a "hard-sell" approach, promoting specific travel destinations in the USA. The plan also concentrated all USTS activities on dealing with the travel trade in six market-nations, and providing for systematic measurement of program results.

This has given USTS a business-like posture; it will also provide a means of evaluating the long-range effectiveness of USTS programs.

Internal reorganization of USTS for increased effectiveness was accomplished early in the year. Personnel and resources were devoted solely to those programs that would earn the greatest return in terms of the number of in-bound tourists and foreign exchange earnings.

Programs of the offices of Market Development; Advertising and Promotion; Information Services; Travel Trade, Business and Convention Travel; Visitor Services; Research and Analysis; and the International Division were geared to this objective.

Heavy emphasis was placed on the tour development program of the Office of Market Development, designed to produce saleable package tours which can be easily purchased by potential U.S. visitors. This was the first such effort in USTS history.

Activities of all USTS divisions and offices were integrated into an overall marketing plan. Thus, the programs were designed to complement and reinforce each other for a resulting synergistic effect.

Two important actions late in the year held exciting promise for the future accomplishments of USTS. An agreement was reached among USTS, the Bureau of International Commerce's Office of International Marketing (a division of the U. S. Department of Commerce), the United States Information Agency, the State Department's Office of Commercial Affairs, and Discover America Travel Organizations, Inc., to coordinate activities and to cooperate in the VISIT USA effort. The vast network of USIA offices abroad represents a great potential for boosting the in-flow of tourists from nations where USTS does not have offices.

Perhaps even more significant in long-range terms was the enactment of legislation transferring domestic tourism promotion and development authority to the Department of Commerce from the Department of the Interior. No authorization or appropriation accompanied the transfer of this basic authority, but USTS ended 1973 by creating foundations on which energetic "home" tourism development could be built if funding becomes available.

Domestic legislation authorizes programs to encourage Americans to travel within the USA and to stimulate the development of tourism services and arrangements to meet the expanding needs of both the domestic traveler and the foreign visitor. Implementation of this authority would rank USTS as a full-fledged national government tour-

ism office. This noteworthy action indicates that the Congress recognizes tourism as a major factor in the U.S. economy, as well as a potent social force in this Nation's relationships among its own people and those of other Nations.

The rapidly developing energy crisis in 1973 motivated USTS to examine its role carefully. Programs were evaluated in view of their possible effect on energy consumption. Modifications were implemented to ensure that the USA did not lose its competitive position in the world travel market, but that emphasis be placed on providing meaningful tourism experiences for international visitors with a minimum impact on the fuel situation.

Steps were also taken to make energy policy-making agencies aware of the importance of the tourism sector of the U.S. economy. Domestically, tourism is estimated to be a \$50 to \$60 billion business, employing between 2.5 and 3.2 million people.

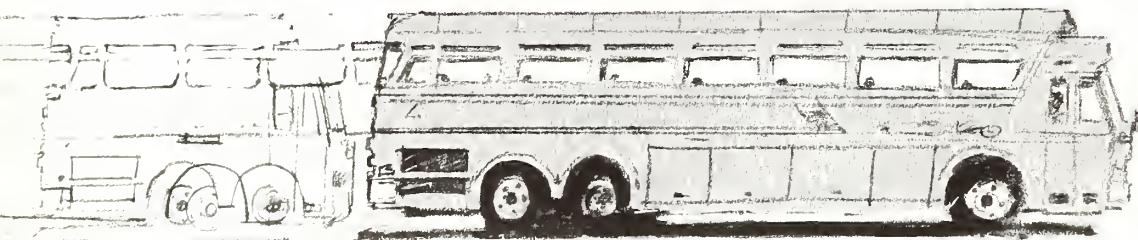
1973 was an action year for tourism, and USTS is gaining momentum as we approach our Nation's Bicentennial Era.

OVERVIEW OF USTS

The United States Travel Service is this Nation's government tourism office. Its mission is to develop travel to the USA from abroad as a means of contributing to the economic stability and growth potential of the U.S.-based travel industry, reducing the Nation's travel deficit, and promoting friendly understanding and appreciation of the USA.

USTS programs for developing the USA as a destination for international tourists are ultimately aimed at preserving the value of the dollar and strengthening the U.S. economy.

Created in 1961, USTS is headquartered in Washington and maintains field offices in six nations: Canada, Mexico, Japan, the United Kingdom, France and West Germany. The agency carries out its tourism development mission through the following offices and divisions:



The Assistant Secretary of Commerce for Tourism

- Is responsible for providing overall direction for tourism activities of the Federal Government; determining basic policies for achieving tourism objectives; maintaining relations with high-level government and industry officials to facilitate tourism plans and programs; and representing the U.S. Government at official travel functions.

The Deputy Assistant Secretary of Commerce for Tourism

- Is responsible for performing the duties of the Assistant Secretary in his absence; providing concrete direction to overall tourism activities; approving basic marketing plans and operation programs; and developing basic policies regarding the most effective public stance for U.S. Government tourism activities.

The Executive Director

- Is responsible for coordinating and supervising operations of all divisions and offices; assuming overall responsibility for marketing operations; developing basic marketing plans; measuring and evaluating results of USTS programs; and providing overall planning, organization, control and administration.

The Office of Administration

- Is responsible for providing administrative services to all offices and divisions; coordinating formulation of budgets; administering fiscal

affairs and contracting/procurement activities; administering personnel functions and activities; and maintaining a program performance measurement system.

The Office of Market Development

- Is responsible for analyzing U.S. tourism attractions and facilities to pinpoint the most saleable features and benefits in specific areas; matching these attractions and facilities to the travel needs and desires of each international market; stimulating development of low-cost package tours and flights by the travel trade; developing plans for tour-arrangements purchasing trips by foreign tour operators and wholesale travel agents; and monitoring marketing activities of competitive travel destinations.

The Office of Advertising and Promotion

- Creates and supervises foreign consumer and trade advertising and promotion programs; evaluates and recommends selection of advertising agencies during the bidding process; supervises the advertising agency under contract; develops and distributes sales promotion literature, audio-visual presentations and visitor guides; operates high-visibility exhibits; and distributes publications of U.S. cities, states and the domestic travel industry to USTS field offices abroad.

The Office of Information Services

- Works with the field offices and market-level communications experts to create travel information programs designed to promote U.S. destinations; reviews and evaluates the programs and performances of local information specialists in each market; stimulates awareness of the importance of international tourism through contacts with U.S. commu-

nations media and travel trade press; develops information materials for use by the field offices and foreign travel press; and develops basic concepts and provides escorts for U.S. familiarization tours by foreign journalists.

The Office of Travel Trade, Business and Convention Travel

- Attracts more international conventions to the USA; promotes attendance from overseas at major U.S. trade shows, conventions and business events; promotes incentive travel from overseas; and develops travel seminars and conferences to bring U.S. travel-sellers and overseas travel-buyers together.

The Office of Visitor Services

- Develops programs to serve international visitors; promotes the development of improved visitor services by the U.S. travel industry; arranges U.S. familiarization tours by foreign journalists, tour operators and retail travel agents; and enlists maximum cooperation of city and state organizations in promoting tourism to the USA.

The Office of Research and Analysis

- Collects and publishes economic data on travel; performs market research and analysis in direct support of tourism development; evaluates results of advertising and promotion programs through research; and prepares and coordinates USTS background reports and position papers for intergovernmental and international travel meetings. In co-

operation with the appropriate Commerce Department offices, R&A maintains surveillance and evaluates the effect of proposed legislative and regulatory decisions on travel and prepares material required for congressional liaison.

The International Division

■ Directs the activities of the field offices; supervises development and

monitors the progress and results of marketing plans for each of the six market-nations; recommends operating budgets of each field office; and assists in developing and implementing country marketing plans.

The Field Offices

■ Mold and implement specific marketing plans for each market-nation; promote U.S. travel through contact with foreign tour operators, wholesalers, travel agents and international carriers; "sell" U.S. travel through contact with travel trade

marketing institutions; serve the travel trade by distributing published information and promotional materials; support the development of business travel to the USA; select tour operators, travel agents and journalists for U.S. familiarization tours; provide input for advertising and information programs; coordinate operation of special exhibits; and collect marketing data.

The Travel Advisory Board

■ Comprising 15 travel industry executives, advises the Secretary of Commerce on tourism policies and programs; assists in relations with industry and government officials and the public; and undertakes special projects as required.

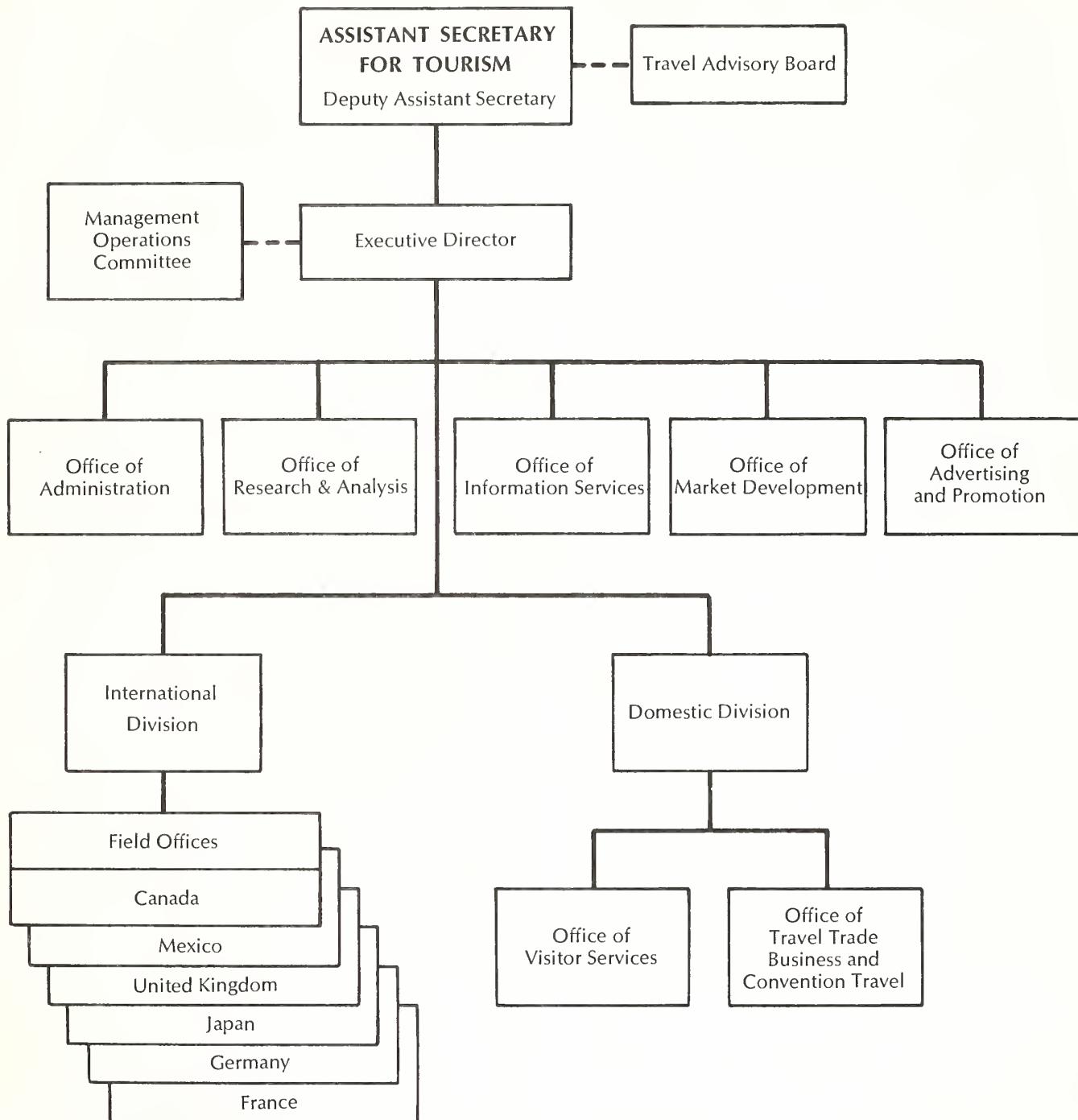
United States Travel Service—Budget

(in thousands of dollars)

	1973 Actual		1974 Estimate	
	Perm. Pos.	Amount	Perm. Pos.	Amount
Promotion of Travel to the United States				
Direct Programs				
Canada	4	\$ 383	8	\$ 636
Mexico	6	261	8	469
Western Europe	22	1,263	25	2,081
Far East	6	652	8	701
South America	2	119	—	—
Support Programs				
Market Development	5	130	6	162
Advertising and Sales Promotion	7	3,100	9	3,419
Familiarization Services	3	98	5	115
Information Services	8	152	8	187
Subtotal	63	\$6,158	77	\$7,770
Domestic Tourist Services and Facilities				
Language Facilities	—	169	—	321
Visitor Services	3	83	4	86
Subtotal	3	\$252	4	\$ 407
Industry and State Programs				
Basic Planning Data	5	802	7	866
Travel Trade, Business and Convention Travel	6	123	6	212
State-City Liaison	2	46	2	48
Matching funds Program	2	636	2	521
Subtotal	15	\$1,607	17	\$1,647
Executive Direction				
TOTAL	96	\$9,000	116	\$11,000

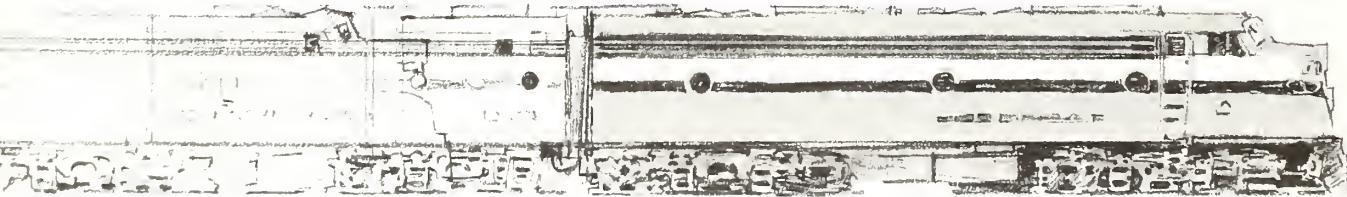
U. S. Department of Commerce

United States Travel Service



Increasingly intense international competition for world travel dollars called for bold and aggressive action on the part of USTS. The agency critically studied and re-evaluated every facet of its operation during 1972. The result of this action was the Integrated Marketing Plan and Measurement System, implemented in early 1973.

INTEGRATED MARKETING PLAN AND MEASUREMENT SYSTEM



Integrated Marketing Plan

This plan of operation was designed (1) to produce tangible results in the form of *incremental* increases in visitor receipts (increases over and above what would normally occur in the market without USTS efforts); and (2) to get the best possible return on the investment of USTS dollars.

The five-year plan, designed to operate during fiscal years 1973-77, states simply that:

—USTS resources will be used to increase demonstrably both the number of international travelers to the United States and the total exchange earnings from the international visitors.

—The primary purpose of all major USTS programs will be to achieve these objectives.

—USTS resources will be concentrated on market-nations which possess the greatest potential for reaching these goals.

—Extensive, carefully planned testing will determine the most effective techniques for accomplishing performance goals.

To achieve these ends in the most efficient possible manner, procedures were established to integrate all programs into a total marketing thrust. This emphasis on integrated activities ensured that complementary components of the agency work in harmony to produce maximum, measurable results.

The primary thrust of the plan's strategy in 1973 was on the sale of travel, and all USTS programs were pinpointed to:

1. Sell the foreign travel trade on selling travel to the USA;

2. Sell foreign travelers on coming to the USA; or

3. Sell domestic organizations on selling travel to the USA.

USTS overseas posts suspended their direct services to the general public abroad and concentrated their sales activities on members of the foreign travel trade, including travel agents, tour operators and transportation representatives, who, in turn, dealt with the general public in each country.

All activities were concentrated in six market-nations, after closing existing posts in Sao Paulo, Brazil, and Sydney, Australia.

The six remaining markets—Canada, Mexico, Japan, the United Kingdom, France and West Germany—account for 87 per cent of the U.S.' foreign visitor arrivals, 74 per cent of its total foreign visitor receipts, and 64 per cent of its total potential travelers from all parts of the world.

These two major steps in concentrating the USTS market focus were taken to produce sales results and to get the greatest return on dollars invested, a major thrust of 1973: Tourism Action Year.

Performance Measurement System

The Performance Measurement System is designed to measure USTS programs with respect to their progress and effectiveness. Specifically the system measures:

1. The extent to which USTS stimulates

—actual and potential travel to the USA;

—other organizations to take specific action which will directly increase travel to the USA; or

—domestic organizations to improve their receptive capabilities for international visitors.

2. The efficiency with which USTS implements its planned programs and carries out its assigned responsibilities.

On-going programs are measured on a quarterly basis. Programs which operate during a relatively short period during the year and which

require specific studies for meaningful evaluation are subject to periodic measurement.

The system involves three basic elements: establishing goals, measuring results and evaluating the measurements.

The performance measurement system produces demonstrable results by providing a logical and systematic way to collect program results and by comparing program results with investments made, such as time, money and personnel.

This comparison, especially in terms of return on USTS dollars invested, produces a tangible measure of USTS' achievements.

For example, during the initial quarter of the measurement system's operation (July 1—September 30, 1973), the Tour Development program produced \$52 in foreign exchange earnings for every USTS dollar invested; the Trade Sales program reported a return of \$1,626 per dollar invested; and the Business Travel program reported a return of \$253 per dollar invested.

Measurement output is produced in a manner conducive to effective management decision-making and overall USTS evaluation.

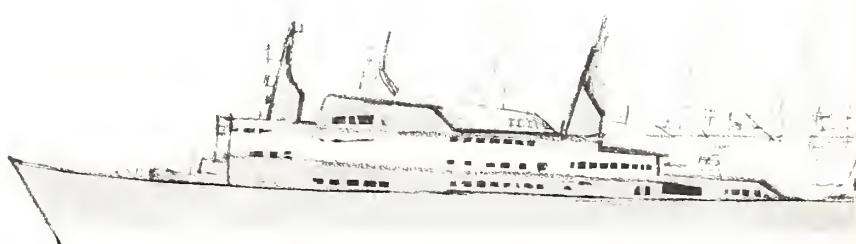
Most major USTS programs are being measured quarterly in the performance measurement system. The first concrete results of the system were produced in the third quarter of 1973. USTS programs being measured and their results during that quarter are as follows:

Performance Measurement System

**Results for Initial Quarter of Measurement:
July 1–September 30, 1973**

Program	Goal	Results During Quarter
Multilingual Receptionists	To establish uniformed corps of multilingual receptionists to welcome and to assist international visitors with entry formalities.	Eighty-four receptionists served at six major airports. Nearly 300,000 international visitors were assisted.
International Symbols	To install international symbol signs in airport and bus terminals to aid international visitors in locating public facilities, baggage areas, currency exchange counters and/or ground transportation.	One gateway airport added international symbol signs during the quarter.
Multilingual Hotel/Motel Certification	To staff switchboards, reception desks and restaurants of hotels and motels with personnel fluent in a second language. In order to qualify, a hotel/motel must offer services in Spanish, French and either German or Japanese, in addition to English.	Eight additional facilities received certification during the quarter.
Travel Phone—USA	To maintain a nationwide toll-free telephone service to assist non-English-speaking travelers in making travel or hotel reservations or in need of any other assistance.	Travel Phone—USA assisted 2,292 non-English-speaking travelers during the quarter.
News Media Programs	To create through the media an awareness abroad of U.S. cultural, industrial, historic, ethnic, scenic, sporting and other attractions.	Promotional efforts in all six nations produced a total dollar advertising equivalent value of nearly \$4.5 million.
Journalist Familiarization Tours	To acquaint journalists with U.S. cultural, industrial, ethnic, historical, scenic, sporting and other attractions; and to generate articles and broadcast coverage of the USA.	Forty-seven foreign travel journalists from six nations participated in familiarization tours during the quarter. They generated 24 articles, amounting to a total dollar equivalent of media space of over \$65,000.

Program	Goal	Results During Quarter
Trade Sales	To engage major accounts, including air carriers, wholesale and retail travel agents and tour operators in active VISIT USA programs.	Sales calls were made on a regular call-pattern, and seminars were conducted for agents and operators who collectively accounted for 359,000 bookings to the USA. Total dollar exchange earnings exceeded \$145 million.
Agent Familiarization Tours	To acquaint foreign tour operators with packageable U.S. attractions; familiarize foreign retail travel agents with VISIT USA package itineraries being marketed in their respective countries; increase the product knowledge of personnel in a position to produce or sell U.S. tour programs.	Twenty-seven wholesale/retail tour operators and travel agents who participated in these tours reportedly generated over 1,300 bookings (increase in bookings for comparable quarter of 1972) resulting in total incremental dollar earnings of over \$300,000.
Tour Development	To develop new competitive VISIT USA tour programs by (a) planning itineraries, (b) packaging and test-selling these, and (c) financially supporting tour folders and catalogs promoting the tours.	Tour packages were developed in three market nations. These tour packages generated over \$3.5 million from almost 10,000 bookings.
Business Travel	To promote VISIT USA incentive travel as a means of increasing company sales and/or industrial production and to solicit foreign attendance at U.S. product fairs, trade shows and conventions.	This program produced \$631,400 in exchange earnings during the quarter through business meetings and incentive travel.
Convention Activities	To commit international associations to hold their conventions in the USA.	During the initial quarter, this program produced exchange earnings totaling \$637,500.





The major thrust of USTS programs is to develop international travel to the USA, in terms of number of international visitors, but especially in exchange earnings from this increased in-bound tourism.

Primary responsibility for these development programs lies with USTS' offices of Market Development, Advertising and Promotion, Information Services, Visitor Services, and Travel Trade, Business and Convention Travel. Programs developed by these Washington headquarters offices are carried out in each market-nation through USTS' six field offices.

DEVELOPING INTERNATIONAL TRAVEL TO THE USA



MARKET DEVELOPMENT

Tourism patterns in the 1960's showed a substantial growth in the use of tour packages—pre-paid travel arrangements that can be sold in volume—on the part of pleasure travelers around the world. The Office of Market Development was created to meet this need and to place the USA in a more competitive position in the world tourism market by meeting the demand for more complete U. S. package tours and for tour components such as optional ground arrangements, transfers and local sightseeing tours.

Tour development became a primary thrust of USTS in 1973, and the importance of this emphasis was confirmed by a 1973 Government Accounting Office study of ten European wholesale tour operators. The study revealed that out of 3,600 tour catalog pages, only 48 pages featured tours to the USA. This com-

pared to 139 pages of tours to East Africa and 119 pages of tours to the Far East.

With the rapidly developing energy crisis in 1973, tour development became increasingly important. Many kinds of tours use mass transportation—buses, trains and planes—at near-capacity levels. Through pre-packaging, tours provide an effective means of directing tourism traffic—and tourism spending—to the USA with the most efficient use of fuel.

USTS estimates that the creation of tours and charter arrangements stimulated by the Office of Market Development will generate an addi-

tional 106,000 visitors and \$44 million in revenues to the USA in 1973 and 1974.

The work of the Office of Market Development is three-fold: to analyze the travel demands of the six USTS market-nations, to study American tourism resources, and to work with tour wholesalers to incorporate these resources into tour packages that can be easily purchased by the international traveler.

Tour Development

Tour development is the capstone of the Office's three programs. It ties together the results of both market and product analysis into the creation of new package tours of the United States.

USTS plays a catalytic role in tour development, providing information and destination expertise in the early stages of a package tour project. Prospective tour wholesalers and the Office of Market Development jointly work out details of a VISIT USA tour package. USTS aids in itinerary planning, acts as a liaison between international wholesalers and local U.S. suppliers, and arranges "buying" trips for foreign wholesalers, providing them an opportunity to survey destinations, inspect facilities and book space for future tour participants.

USTS can also provide financial assistance for the production of such items as tour catalogs, point-of-sale promotional material and advertising. In keeping with the philosophy of the Integrated Marketing Plan, USTS advertising programs support tour package promotions; and agent and journalist familiarization trips relate closely to itineraries developed by the tour wholesalers.



USTS support is made available to foreign wholesalers who produce, promote and operate the tours that will sell best in their particular market-nations. Once the tour program is launched, USTS monitors it to ascertain the booking results, number of tourists and volume of exchange earnings that are generated by these tours.

During 1973, the tour development program operated on a test basis in three of USTS' principal markets—United Kingdom, Germany and Canada. Tour operators in those three nations instituted approximately 60 new USA tour arrangements as a result of the program. The program will be extended in 1974 to all six markets.

Market Analysis

The market development staff uses the research developed by the Office of Research and Analysis to pinpoint the types of vacations that would sell best in each USTS market-nation. At

the same time, this office conducts an on-going competitive analysis of the programs of other national tourism offices.

Because the United States competes with other nations as a destination for a share of the world travel market, knowledge of what other nations are doing to promote tourism is vital.

Product Analysis

The goal of product analysis is to match existing U.S. tourism destinations and facilities with the travel desires of the international market.

This program identifies U.S. destinations that might interest tour wholesalers and stimulate them to design new package tours to the USA.

A 'product highlighter' was developed in 1973 to show tour wholesalers how they can combine new destinations and vacation themes into innovative package tours to the USA and meet the travel desires of potential visitors with a multiplicity of interests.

This sales tool consists of a map of the United States with color overlays showing the locations of various categories of vacation sites, such as national parks, health spas, dude ranches, whitewater rafting expeditions, beach resorts, ski centers, Indian reservations, amusement parks and sightseeing cruises. The map is augmented by a highly-detailed reference guide containing names, locations, seasons, costs and contacts for each site.

The impact of this sales tool is to show the immense diversity of USA travel resources. It is used by field office and market development personnel to stimulate interest in producing new package tours and to diversify the scope of existing tours by combining new destinations with attractions currently being marketed to international visitors. In this way, USTS hopes to broaden the market appeal of USA vacations and spread the flow of international visitors to additional travel spots in the USA.



ADVERTISING AND PROMOTION

Action Year '73 brought a change in USTS' advertising agency and in the strategic emphasis of USTS' advertising program. Young & Rubicam, Inc., selected in July, 1973, as the new advertising agency, was given the task of developing hard-sell country-by-country campaigns in four USTS primary markets: Canada, Mexico, the United Kingdom and Germany.

Each campaign is tailored to the profile of the country travel market.

In the United Kingdom and Germany, the campaigns emphasized low-cost tour packages, developed by local tour wholesalers in conjunction with USTS' Office of Market Development. These packages, priced for value-sensitive customers, are designed to offer affordable U.S. vacations to the large number of travelers in these nations who are



purchasing similar tours to European, Asian and South American destinations.

Canada's market profile called for two separate campaigns; one for winter and one for summer. The winter campaign stressed package tours featuring low-cost charter flights to Florida, California and Hawaii as an alternative to winter tours to competitive non-USA "sun and fun" destinations.

The summer campaign, planned in 1973 for implementation in early 1974, will feature seven different tours of various regions in the USA.

USTS' advertising theme in Mexico emphasizes the low cost of U.S. vacations. It highlights bargain air fares, low-cost 15-day unlimited use bus tickets, and the availability of economical accommodations and meals. Each ad concludes with the line, "Para variar . . . sea usted el turista. Visite los Estados Unidos" ("For a change . . . you be a tourist. Visit the United States.").

Newspaper and magazine ads in Canada, the United Kingdom and Germany include coupons which prospective travelers can submit for additional information. Coupon fulfillment packets include specific and general information regarding tour packages, special discounts, exchange rates, clothing requirements, etc. After the fulfillment information is sent, the coupons are forwarded to selected agencies or tour operators in each market-nation for sales follow-up.

The coupon fulfillment method was not used in Mexico, owing to proven low response to this type of advertising. There, advertisements urge potential travelers to visit a travel agent who maintains supplies of VISIT USA guides for their convenience.

The planned advertising expenditure for each market-nation during fiscal year 1974 was as follows:

Canada	\$498,500
Mexico	\$377,000
United Kingdom	\$659,000
Germany	\$434,800

Promotional Materials

USTS field offices provided VISIT USA travel agents with over four million brochures and travel promotion pieces in 1973. The Office of Advertising and Promotion produced a series of new regional guides covering the main attractions of each state within geographic regions and revised its folders on 22 U.S. cities. All promotional literature was produced in at least four languages.

New editions of two directories were published: *U.S. Conventions and Trade Shows and Festival USA*. The latter lists more than 800 festivals and other special events to be held in the United States during 1974, and is prepared primarily for use by travel agents and tour operators abroad.

USTS produced several new VISIT USA travel posters, updated and enhanced its photographic library, and, through its matching grants program, assisted in the production and distribution of five regional USA films.

Mobile Exhibit

USTS' Mobile Exhibit continued its round-the-world mission as a USA tourism "invitation," appearing in Battersea Park, London, from May 18 to September 2, 1973. Public attendance during the Exhibit's London appearance totaled 122,000.

The VISIT USA Mobile Exhibit is a six-story theater housing Walt

Disney Productions' 360-degree Circle-Vision film, "America the Beautiful."

USTS emphasized publicity generated by the Exhibit and the Exhibit's use by the travel trade in the United Kingdom. Each Monday, the Exhibit was officially closed to the public and used exclusively by members of the travel industry as a sales tool. Major airlines, for example, used the theater as an aide in promoting USA destinations. British travel agents and travel writers were among key groups invited to trade and promotional events at the Exhibit.

Members of the travel trade in the United Kingdom used the Exhibit for such purposes as training or briefing staff members, sales incentive gatherings, special receptions, package tour promotions, sales lectures and meetings, and press receptions.

USTS conducted a series of promotional events to ensure a consistently high level of public attendance at the Exhibit and a high level of public awareness and recognition of the USA as a travel destination.

The Exhibit was staffed by a team of USA Ambassador Girls who welcomed the public, passed out a VISIT USA brochure and answered questions about USA travel destinations. Members of the public visiting the Exhibit who registered their names and addresses received follow-up

information on USA travel products and destinations.

USTS conducted extensive market research on the USA as a travel destination in connection with the Exhibit. The resulting study included such information as attitudes toward the USA as a travel destination, appeal of the Mobile Exhibit, and the travel behavior and demographic characteristics of persons who toured the Exhibit.

Internationale Tourismus Börse (ITB)

The Office of Advertising and Promotion coordinated USTS' participation in the International Tourism Exchange (Internationale Tourismus Börse) in Berlin in the spring of 1973.

The purpose of the travel exhibition project was to provide a business lounge where approximately 30 U.S. travel suppliers could conduct business sessions with foreign travel representatives in order to develop new tour arrangements from Ger-

many to the United States. Increased German public awareness of the USA as a travel destination was another objective of the project.

Approximately 130,000 members of the German public visited the USTS exhibit at the ITB. Brochures on USA destinations were available at the USTS information booth, and visitors could view a slide presentation on USA destinations.

Emphasis at the exhibit was on low-cost package tours to the USA and bargain air fares.

U.S. travel trade participants in USTS' ITB exhibit included representatives of major airlines, tour operators, car rental firms, hotel chains and bus lines.



INFORMATION SERVICES

The Office of Information Services continued to play a major role in the promotion of international travel to the USA in 1973 and expanded its activities in several areas.

Through its work with newspapers, magazines, radio and television in USTS' six market-nations, the Office intensified efforts to create a greater knowledge of vacation opportunities the USA offers travelers and an increased interest in the USA as a travel destination.

Destination Feature Packages (DFPs), a sales tool introduced in 1972, were refined and increased as the primary foreign media aid during the year. Each package consists of a feature article, fact sheet, photographs, maps and brochures about a series of USA attractions on a similar theme.

Themes covered during the year included wine-producing areas of the USA, bicycle trails, outdoor museum villages, whitewater rafting, port and harbor cities, wildlife, outdoor dramas, health and beauty spas, tennis ranches and oceanariums.

In selecting themes for the year, the Office of Information Services struck a balance between outdoor themes emphasizing the nation's natural wonders and big city themes describing the nation's metropolitan areas as safe and enjoyable destinations offering visitors a variety of vacation opportunities.

As the energy crisis developed during the latter part of 1973, DFPs included information on convenient

mass transportation access to attractions mentioned, and featured such vacation ideas as bicycle trails, walking tours and bus routes designed to offer visitors enjoyable vacation experiences with a minimum of energy consumption.

Bicentennial-related events and attractions were emphasized more and more in connection with U.S. destinations as the year progressed.

Late in the year, a DFP emphasized vacation opportunities in the Pacific Northwest in connection with Expo '74, the World's Fair with an environmental theme scheduled for Spokane, Washington, during the summer of 1974.

Each DFP prepared in Washington was edited and translated in each of USTS' six market-nations, and was usually offered to a particular foreign publication on an exclusive basis.

The program was integrated closely with package tour promotions developed during the year by the Office of Market Development.

The DFPs were not only used by the foreign media, but were also utilized by the foreign travel trade. The packages suggested new ideas which might be included in package tours and provided travel agents abroad such detailed information as seasons, hours, location and prices of various attractions.

Editorial Support Packages

A companion sales tool—Editorial Support Packages—was also expanded during tourism's "Action Year." These articles and accompanying photos generally dealt with visitor services such as multilingual port receptionists and Travel Phone-USA, both providing language assistance to international visitors.

Other articles in this program featured home hospitality programs for international visitors, convention facilities geared to international meetings, and U.S. travel bargains.

Other Programs

The Office of Information Services also administers the activities of professionals in the field of public information working for USTS on a contract basis in each of the six market-nations. The Office sponsored a three-day Washington conference for the information professionals in October. Participants reviewed the effectiveness of information programs conducted during 1973 and conducted an in-depth planning session in preparation for USTS' participation in the Bicentennial Era.

The Office also developed themes for U.S. familiarization tours by foreign journalists and provided hosts for these tours, conducted in cooperation with the Office of Visitor Services.



FAMILIARIZATION TOURS

"Familiarization" tours are designed to acquaint foreign travel experts with USA destinations and tour offerings. The theory behind the tours is that if a select number of travel experts can be convinced first-hand of the vast travel opportunities of the USA, their knowledge and enthusiasm will be translated into action and tourism results when they return to their home nations.

Closely integrated with the tour development program of the Office of Market Development, familiarization tours are designed to stimulate and facilitate the development of USA tours by foreign tour producers, to familiarize managers and em-

ployees of foreign travel agencies with actual tours of the USA, and to generate written copy and photographs in foreign publications for the purpose of developing the USA-bound travel market.

Familiarization tours generally can be divided into the following three main categories:

"Buying" Tours for Tour Packagers

The objective of this type of familiarization tour is to facilitate the development and assembly of VISIT USA tour arrangements by enabling foreign wholesale agents and tour operators to become acquainted with available USA travel opportunities, facilities and services and to aid them in putting all these elements together in saleable itinerary packages.

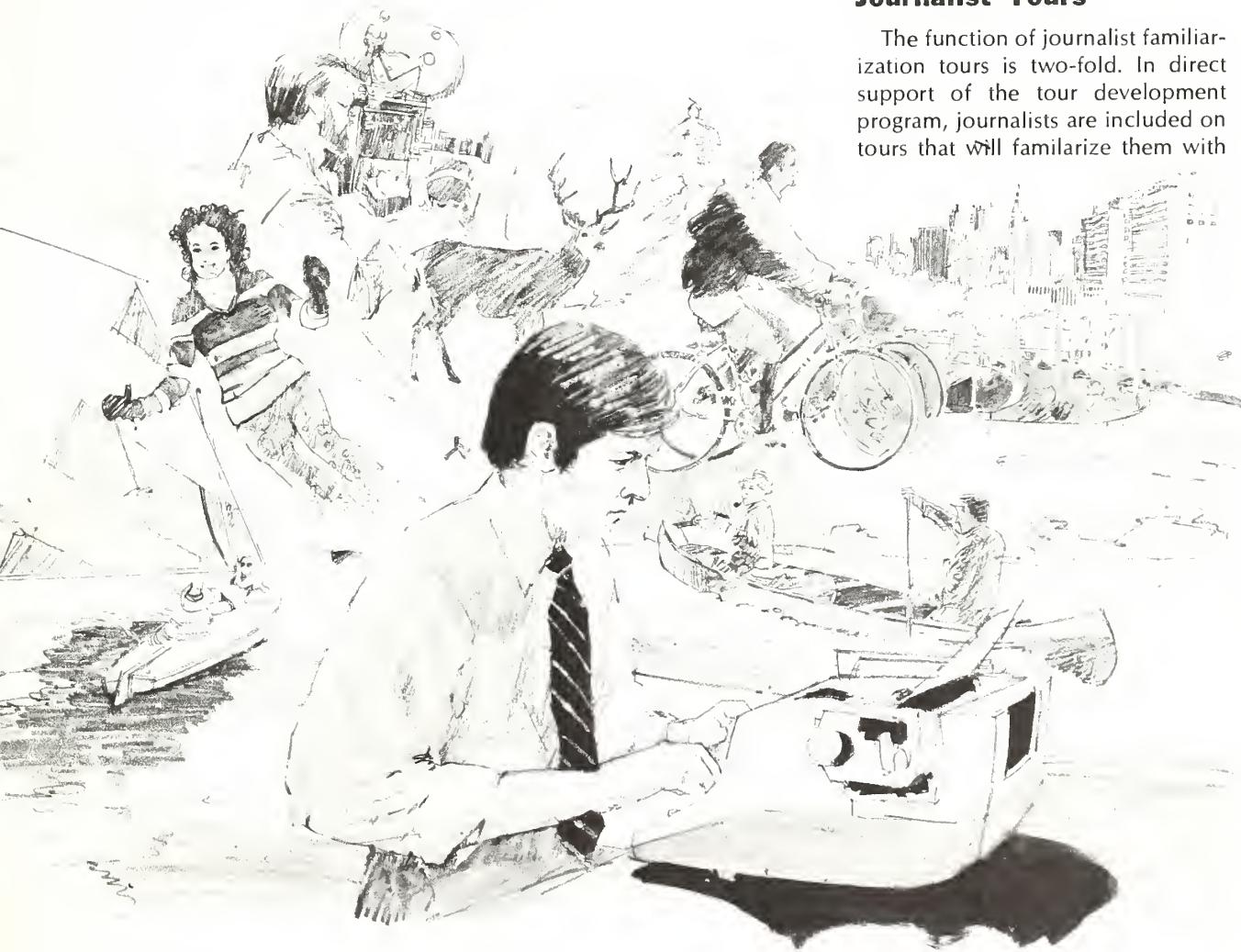
Participants on these tours are given an opportunity to negotiate first-hand with U.S. travel suppliers; inspect packageable U.S. attractions and events; and investigate domestic packages which can be used as the land portion of overseas-originating tours or used as optional extensions of such tours.

Travel Agent Tours

When the tour packages are ready to be marketed in the operator's home nation, USTS hosts retail travel agents of that country so they may become familiar with the "product" they will be selling to the traveling public. This program is designed to increase sales of tour offerings created under the tour development program.

Journalist Tours

The function of journalist familiarization tours is two-fold. In direct support of the tour development program, journalists are included on tours that will familiarize them with



the actual packaged "product," in an effort to acquaint the public of each nation, through the media, with the new VISIT USA tour offerings.

Other journalist familiarization tours are designed to generate coverage in foreign media which will produce consumer demand of sufficient magnitude to cause U.S. destinations to be packaged and sold by wholesalers and tour operators.

A new concept in journalist familiarization tours was introduced in 1973 with the "theme" approach. This approach has a number of advantages. It provides an opportunity for writers to sample related opportunities and attractions in various regions of the USA, instead of concentrating each tour in one geographical area, thus diversifying each writer's knowledge of the USA as a travel destination.

It provides an opportunity for USTS to obtain coverage by foreign publications whose specialties are peripheral to tourism. For example,

gourmet writers may participate in a tour themed to USA food specialties; entertainment writers may participate in a tour themed to jazz or theater; or writers for ski publications may participate in a tour themed to downhill or cross-country skiing.

Themes explored by foreign journalists during 1973 included: "Cowboys and Indians," which included visits to rodeos and Indian villages; "For Night People Only," which focused on late shows, night clubs and casinos in San Francisco, Chicago, Las Vegas, New York, Miami and Atlanta; and "Regards to Broadway," during which writers attended theatrical productions and were able to interview directors and other theatrical personalities.

USTS also occasionally departs from the theme approach to meet individual needs of foreign media representatives. An example of this was the itinerary arranged for a camera crew from the British Broadcasting Corporation. This tour enabled the BBC to prepare several U.S. travel-related documentaries for broadcast in the United Kingdom.

The Office of Visitor Services car-

ries out detailed preparatory work for each familiarization tour, coordinating itineraries with state and city co-hosts, arranging ground transportation and accommodations, and supporting "waiver" requests of participating air carriers to the Civil Aeronautics Board.

A USTS staff member, private expert in the theme emphasized during the tour, or professional tour escort and linguist under contract with the Department of State accompanies each tour.

In the case of journalist familiarization tours, theme ideas and tour hosts are provided by the Office of Information Services. In the case of familiarization and "buying" tours for foreign tour operators and travel agents, the Office of Market Development plays a key role.

The effectiveness of the various types of familiarization tours is evaluated in different ways. The effectiveness of tours for wholesalers is judged by the resulting new tour packages. Retail travel agent familiarization tours are evaluated on the basis of increased retail sales volume. Media tours are measured by equating what the resulting press coverage would have cost if purchased as advertising.

Listed below are the estimated results, in terms of equivalent advertising dollar value, of the first 11 journalist tours of 1973:

NAME OF TOUR	MONTH	VALUE OF RESULTING PRESS COVERAGE*
"New Mexico . . . High & Low"	February	\$86,376
"USA . . . And All That Jazz"	February	169,705
"Symphony of America"	March	18,727
"American Ways of Life"	April	2,025
"Garden Spots, USA"	April	12,875
"Paws, Claws, & Jaws"	May	6,121
"USA: A Nation on Wheels"	May	95,170
"Under the USA Stars"	June	12,500
"Liquid Highways"	September	14,932
"Cowboys & Indians"	September	17,720
"New England Colors"	October	89,042

*These figures reflect results received by December 31, 1973. Results will continue to be received from these tours in 1974, as many articles prepared by journalists participating in the tours are published months after the tour's conclusion.

BUSINESS TRAVEL

International Congresses

USTS continued its efforts to win major international congresses for the USA in 1973. The headquarters of USTS' International Conventions Office in Paris was transferred to Washington and became the nucleus of a new Office of Travel Trade, Business and Convention Travel.

This Office played a major role in winning 12 additional major international conventions for the USA in 1973, bringing the four-year program total to 47.

Foreign attendance of about 27,000 and foreign currency receipts in excess of \$7.4 million are expected to be generated by the 47 congresses. This estimate is based on an average expenditure per delegate of \$50 daily and an average congress duration of 5.4 days. It does not include dollar savings which will result from the fact that U.S. delegates remain at home in the year the congress is held in the USA. Nor does it include dollar earnings resulting from air fares paid to U.S. flag car-

riers by foreign delegates, or foreign delegate expenditure for pre- or post-congress study or vacation visits, or expenditures by accompanying spouses.

USTS maintains contact with international associations and urges their American affiliate associations or members to invite the international associations to hold their congresses in the USA. USTS also maintains up-to-date information on U.S. convention facilities capable of hosting international congresses.

The agency also plays a role in promoting foreign attendance at conventions and trade shows held in the USA and has provided matching funds to facilitate simultaneous language translations at international meetings with a significant number of foreign participants.

Incentive Travel

Incentive travel programs are being explored as a marketing tool by the Office of Travel Trade, Business and Convention Travel. A popular concept in the USA, incentive travel is used by a variety of industries to build sales, production and employee morale. The programs generally offer luxury vacations as an incentive for increased sales or productivity.

The concept, although not widely used in other nations now, is growing in popularity, and USTS is studying ways of tapping this potentially large travel market. A test program, based on selling overseas firms on the idea of incentive travel and bringing them together with experts in this technical field, began late in 1973.

USTS selected the United Kingdom as the starting point for the program, because companies there are attuned to the incentive concept and because there is no language barrier to inhibit the travel promotion.



World Tourism Seminars

World Tourism Seminars were initiated in 1970 to bring U.S. travel-sellers together with foreign packagers of VISIT USA tour components. "Action Year" seminars in 1973 were held in Paris and Frankfurt and were coordinated by the Office of Travel Trade, Business and Convention Travel. Seminar emphasis was on promotion of incentive travel and international congresses for the USA.

Travel Mart

The Fifth Annual Discover America Pow Wow and Travel Mart was held in Tucson, Arizona, in September, 1973, under the joint sponsorship of USTS and the Discover America Travel Organizations, Inc. (DATO). Within USTS, the Office of Travel Trade, Business and Convention Travel served as project office for this event.

The Travel Mart is designed to bring together at one time and in one place foreign tour operators and U.S. travel suppliers for three days of concentrated discussions and sales meetings.

The gathering gives foreign tour operators an opportunity to contract to buy block space in U.S. hotels or to book transportation arrangements for foreign participants in upcoming tours to the USA. It also enables participants from the USA to renew industry contacts and develop new contacts for U.S. tourism promotion and to gain a better understanding of the interests of foreign tour wholesalers and their needs for tour packaging. Foreign travel agents are given an opportunity to become familiar with the travel potential of various areas of the USA.

The 1973 Pow Wow and Travel Mart was the largest such gathering in the five-year history of the program. More than 8,000 interviews were scheduled between 296 foreign

tour operators from 46 companies and some 587 American travel suppliers representing accommodations, attractions, destination areas and various modes of transportation.

USTS distributed questionnaires designed to evaluate sales results of the 1973 Pow Wow. Thirty-one per cent of the participating U.S. firms responded to the questionnaires indicating they made firm and/or future sales commitments totaling \$11.3 million. This represented a 21.7 per cent increase over the \$9.3 million in sales reported after the 1972 Pow Wow. An additional 20 per cent of the U.S. participants indicated that they made firm and/or future sales, but did not quantify them in terms of dollars. These commitments covered 1974 and extended through the Bicentennial Era.



INTERNATIONAL DIVISION

USTS' field offices are responsible for implementing the agency's programs. Field office personnel provide the bulk of USTS' face-to-face contact with the travel trade in the six market-nations in which the agency operates.

The International Division was structured in early 1973. An "Action Highlight" of the year was the designation of a Managing Director for the division to centralize and consolidate the line management of all field offices abroad, and to represent these offices at USTS Headquarters in their working relationships with the Office Directors and their functional staffs.

This restructuring provided the field offices with clear-cut supervision and direction in the development and execution of individual country marketing plans. It provided a focal point for budget allocations,

travel industry sales programs and the implementation of headquarters-developed programs in the field.

In order to mount the most effective possible programs, USTS concentrated its efforts on those nations which produce 87 per cent of U.S. visitor arrivals and 74 per cent of U.S. earnings from in-bound tourism.

Therefore, a decision was made to close down two overseas posts: Sao Paulo, Brazil, and Sydney, Australia.

During 1973, the International Division was directly involved in accomplishing the following:

—Systematically selecting and ranking the 200 to 300 most important actual and potential VISIT USA travel trade contacts in each market-nation. These contacts account for as much as 80 per cent of the sale of travel to the USA from the six markets.

—Developing sales call patterns and record systems to cover each selected USA trade account in the most effective and efficient manner. This system will result in approximately 15,000 sales calls annually in the combined six market-nations.

—Establishing high individual performance goals for the field staff and implementing an equitable performance rating system designed to motivate personnel.

—Organizing and conducting fiscal year 1974 and 1975 field office budget and planning meetings in Washington, the first Field Office Administration and Controls meeting, and the first Regional Sales Training Seminars for field office personnel.

—Organizing and implementing in two countries—United Kingdom and West Germany—a new program appointing leading retail travel agen-

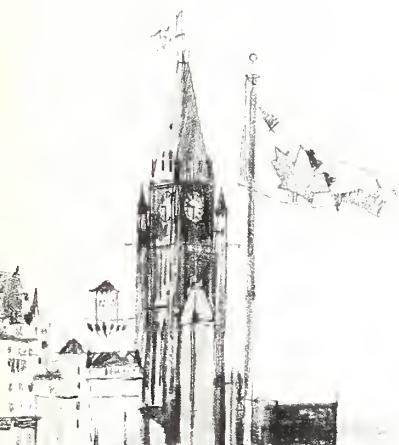
cies as "VISIT USA Travel Planning Centers." The selected agencies are given special USTS training and support to sell the USA as a travel destination and to serve as an information office on all aspects of travel to the USA for the general public. Over 250 such appointments were made in 1973. The concept will be expanded to other USTS markets when feasible.

—Coordinating the design and production of an improved country marketing plan format, resulting in more complete and better organized content to serve as blueprints for action.

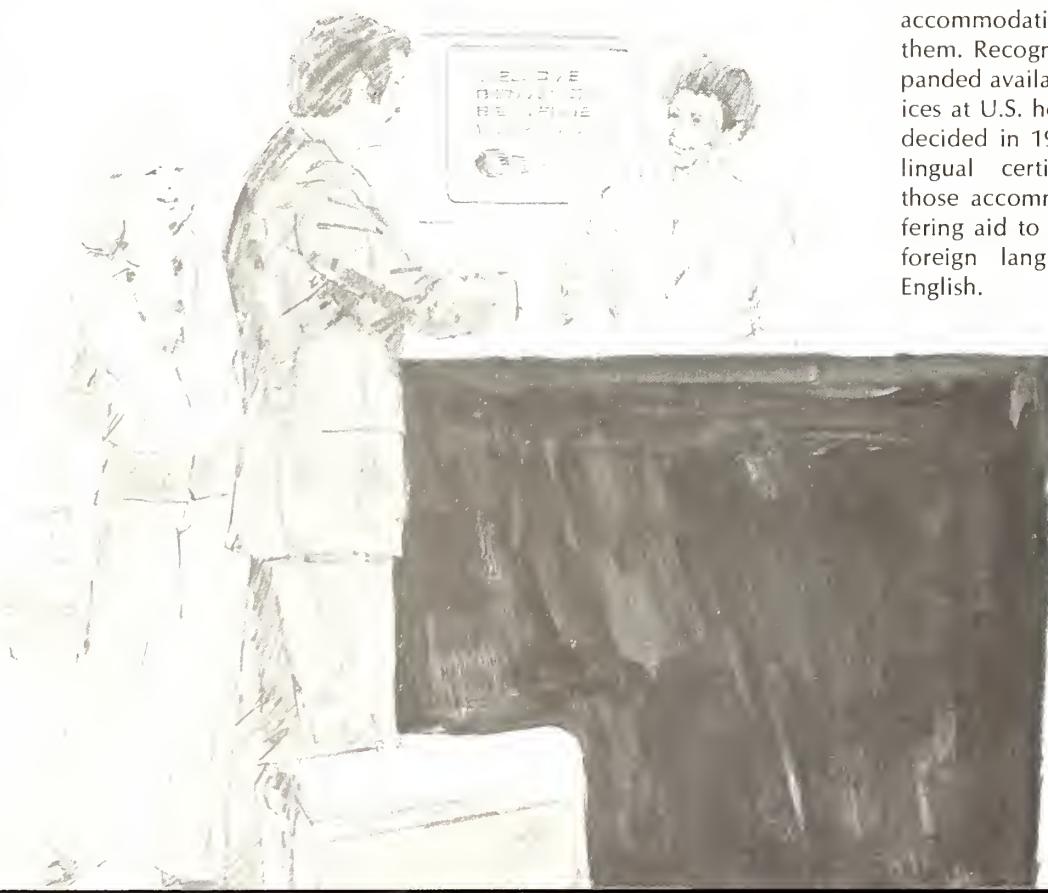
—Designing, implementing and streamlining a management progress reporting system from field office to headquarters to fill a management control communications gap.

—Designing and implementing an internal communications system between the field offices and headquarters, in which all key correspondence in both directions flows through the International Division for control, assignment and follow-up action.

—The newly-created position of Managing Director was given responsibility for providing on-the-spot supervision and direction to USTS personnel abroad. In order to provide this intensive direction and line supervision on a continuing basis, the Managing Director devoted 25 per cent of his available time to the field offices and the market-nations they serve, visiting each field office at least three times a year.



SERVING OUR INTERNATIONAL VISITORS



Facilitating the stays of international visitors in the USA is a function of the Office of Visitor Services. Many of the programs in this area are designed to help visitors overcome language barriers and to encourage U.S. travel suppliers to compete for the foreign visitors' business.

Hotel/Motel Language Certification Program

An additional 20 hotels and motels were certified in 1973 as providing multilingual services to visitors. This brings to 232 the number of accommodation facilities in the USA which have agreed to staff their front desks, switchboards and restaurants with personnel who speak Spanish, French and either German or Japanese in addition to English.

The program was initiated in 1969 as a means of relieving the language fears of foreign visitors who hesitate to visit the USA because they are not fluent in English. USTS publicizes abroad the language resources of participating hotels and motels and authorizes them to display a USTS language certification plaque.

Qualifications for multilingual certification are stiff, and not many accommodation facilities can meet them. Recognizing the need for expanded availability of language services at U.S. hotels and motels, USTS decided in 1973 to offer a new bilingual certification program to those accommodations facilities offering aid to travelers in one major foreign language in addition to English.

USTS commenced a survey of properties with management or key employees—including switchboard and restaurant personnel—who are capable of effectively communicating in either Spanish, French, German or Japanese.

A listing of these properties—in excess of 1,000 as of the end of 1973—will be distributed to all key operators, agents and airlines in Mexico, Japan, French-speaking Canada, France and Germany.

Multilingual Port Receptionist Program

Multilingual port receptionists welcome and assist incoming international visitors with U.S. entry formalities and in making transportation connections.

The program is conducted by USTS in cooperation with local colleges and universities, the Department of Health, Education and Welfare, and airport authorities.

The students' salaries are paid from funds available to educational institutions under the Office of Education's College Work-Study Program and by USTS.

Two additional airports joined the program during 1973: Miami International Airport in Miami, Florida, and Dulles International Airport in Washington, D.C. Similar corps are functioning at New York's Kennedy International Airport, Seattle/Tacoma International Airport, San

Juan International Airport and Philadelphia International Airport.

By the year's end, there were some 50 participating students at Kennedy, 20 at Seattle/Tacoma, 16 at San Juan, 10 at Philadelphia, 9 at Miami and 5 at Dulles.

Symbol Signs

USTS urges airports and other terminals to use international symbol signs for the convenience of travelers from abroad as well as for American travelers.

Many major gateway terminals are now using these symbol signs, including airports in Philadelphia, Boston, Kansas City, Oklahoma City, Pittsburgh, Portland, San Antonio and Seattle. USTS' goal is to have these signs installed at all gateways and most of the country's large airports and railroad and bus terminals.

Travel Phone-USA

Travel Phone-USA, a nationwide multilingual toll-free telephone service sponsored by USTS in cooperation with Travelodge International, continued in its fourth year.

The international visitor can dial the service toll-free from anywhere in the contiguous United States and

obtain telephone interpreter assistance or answers to travel-related questions in Spanish, French, German, Japanese and English.

A USTS brochure in the five languages explains the service and contains a perforated card with the telephone number. The card may be torn out and carried by the traveler for convenient reference.

Travel Phone-USA makes assistance available to international visitors at the nearest telephone. In addition, airline, hotel and police personnel who encounter language difficulties with guests from abroad may use the service. More than 6,000 international guests used this service in 1973.

Americans At Home

The Americans at Home program, a community-operated host plan for international visitors, continued in its tenth year of operation.

Americans at Home is designed to enable international visitors to get to know Americans informally in their homes. The total number of cities participating in the program was 55.



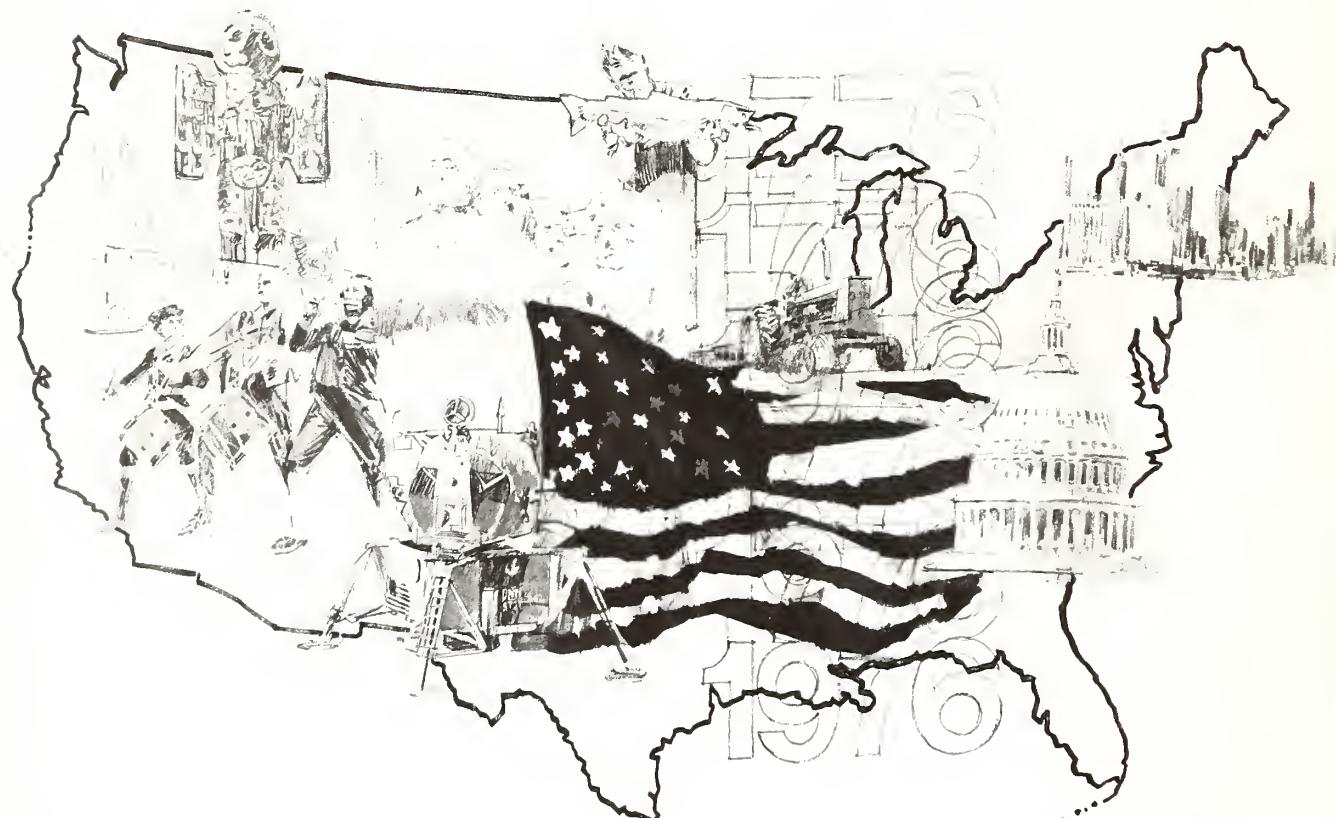
BICENTENNIAL

USTS will invite the people of the world to participate in the 200th anniversary of the United States. During 1973 the agency increased efforts to prepare for the Bicentennial Era.

One step, late in 1973, was the appointment of a Special Assistant for Bicentennial Affairs. His role will be to serve USTS and the Department of Commerce by coordinating Bicentennial projects with the American Revolution Bicentennial Administration, other governmental agencies and private organizations.

Professionals in the promotion and information field working with USTS in its six market-nations emphasized Bicentennial Era plans during their planning session held in Washington in October, 1973. They were charged during the meeting with formulating innovative projects, media aids and special events in

OTHER ACTION YEAR PROGRAMS



their home nations to stimulate awareness of the American Revolution Bicentennial and to promote international participation during the Bicentennial Era.

Many on-going USTS programs are being modified or dramatized to further the objectives of the Bicentennial. For example, Destination Feature Packages mention Bicentennial-related events or attractions whenever possible. The multilingual port receptionist program is being expanded to welcome and assist Bicentennial visitors from abroad. Journalist familiarization tour hosts convey information whenever possible on plans for the upcoming Bicentennial celebration.

And USTS is gearing up to provide detailed information on Bicentennial events, celebrations, activities and projects to overseas outlets for distribution to the public.

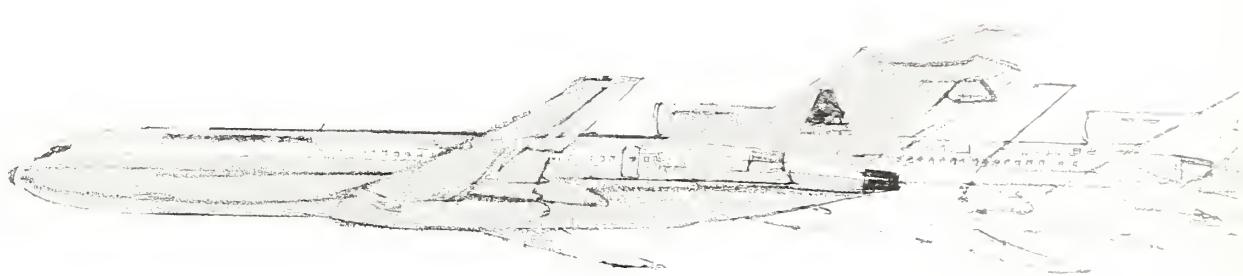
USTS/USIA COOPERATION

In mid-1973, USTS and the United States Information Agency entered into an agreement calling for a joint effort to promote international tourism to the United States. Under the agreement, procedures will be worked out through which USIA will complement the efforts of USTS.

USIA posts will undertake tourism support programs in close consultation and cooperation with USTS abroad. Both will consult and coordinate closely on programs for nations where USTS does not have an office.

DOMESTIC AUTHORITY

In December, 1973, Congress enacted legislation transferring domestic tourism promotion and development authority to the Department of Commerce from the Department of the Interior. The legislation authorizes programs to encourage Americans to travel within the USA and to stimulate the development of tourism services and arrangements to meet the rapidly expanding needs of the domestic traveler in the United States. Further Congressional action will be required to fund any domestic program before it can be implemented by USTS, as the transfer of authority included no appropriation authorization.



IUOTO/WTO

The United States, through the Department of State and USTS, participates in the International Union of Official Travel Organizations (IUOTO). With more than 100 member nations as well as a number of associate members, IUOTO performs three major functions. It assembles statistics on world tourism; carries out studies of the technical aspects of tourism; and takes positions on issues of major importance to world tourism.

USTS represents the United States on IUOTO's Executive Committee. During 1973, a USTS representative attended the organization's General Assembly in Caracas, Venezuela, and Executive Committee meeting in Warsaw, Poland.

An organization of intergovernmental character affiliated with the United Nations system is being formed from IUOTO. This World Tourism Organization (WTO) will serve as an intergovernmental forum for the exchange of ideas and a vehicle for the development of tourism technology.

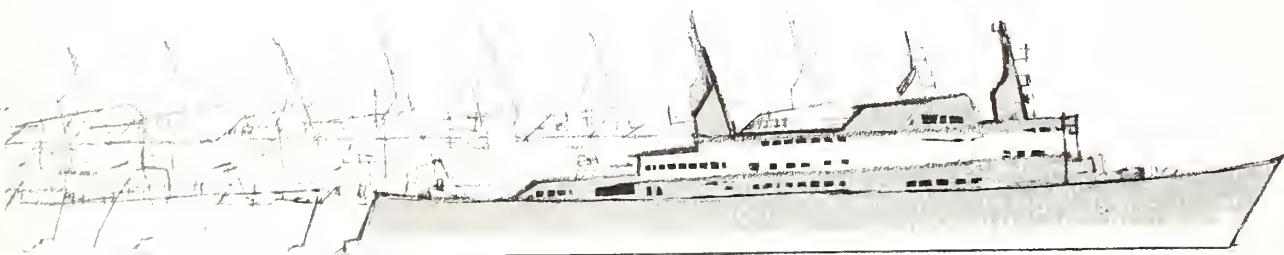
In 1973, the United States Senate consented to U.S. ratification and the President signed the WTO statutes. Ratification will be complete when the statutes are deposited with the Swiss government in Geneva.

To date, over 40 of the 51 needed countries have ratified the 1970 statutes to bring WTO into existence. It is expected that the remaining necessary ratifications will be obtained in the near future.

MATCHING GRANTS

Cities, states and non-profit organizations are eligible to participate in USTS' Matching Grants Program, which was launched in mid-1971. The grants may be used for projects promoting travel to the USA or for improving domestic services for foreign visitors.

Grants totaling \$421,043 were awarded during calendar year 1973, as follows:*



Matching Grants Awarded During Calendar Year 1973

GRANTEE	FEDERAL SHARE	PROJECT
City of Miami Beach Development Authority	\$32,727	Canadian winter advertising campaign
City of Miami Beach	\$36,818	European advertising campaign
Florida Department of Commerce	\$16,200	Canadian winter advertising campaign
Discover America Travel Organizations Inc., D. C.	\$ 8,000	To establish a U.S. Travel Data Center
County of Erie, New York	\$ 5,750	Travel research
County of Erie, New York	\$16,250	Canadian spring advertising campaign
State of Hawaii Visitors Bureau	\$ 4,250	Japanese language film on Hawaii
Clinton County, New York	\$ 9,000	Canadian Spring advertising campaign
Pittsburgh Convention and Visitors Bureau	\$25,000	Canadian Spring advertising campaign
New York State Department of Commerce	\$50,000	Canadian Spring advertising campaign
Saratoga County, New York	\$10,000	Canadian Spring advertising campaign
County of Warren, New York	\$10,000	Canadian Spring advertising campaign
San Antonio Convention and Visitors Bureau	\$10,000	Advertising in Mexico
City of Arlington Texas (Metroplex)	\$10,000	Advertising in Mexico
Florida Department of Commerce	\$ 3,500	Advertising in Mexico
National Screw Machine Products, Ohio	\$ 700	Interpretation Services for International Congress
Essex County, New York	\$16,000	Canadian Spring-Summer advertising campaign
City of Corpus Christi, Texas	\$10,000	Advertising in Mexico
Old West Trail Foundation	\$10,000	Canadian Summer advertising
State of New Jersey	\$10,000	Canadian Spring advertising campaign
Texas Tourist Development Agency	\$17,437	Advertising in Mexico
State of Alaska	\$ 1,086	Advertising in Japan (supplemental grant)
Philadelphia Convention and Tourist Bureau	\$ 3,240	Advertising in Canada
State of Maine Dept. of Commerce & Industry	\$21,948	Develop northern New England travel analysis system
Pacific Area Travel Association, California	\$19,817	In-flight travel survey
Meridian House International, Washington, D.C.	\$44,120	Collect data on foreign visitors during Bicentennial
State of Maine, Department of Commerce and Industry	\$19,200	New England tourism promotion film

*Due to budgetary limitations, the Matching Grants Program was temporarily suspended early in 1973 and re-activated in January 1974.

RESEARCH AND ANALYSIS



STS' Office of Research and Analysis provides both the quantitative and qualitative data necessary for the planning and evaluation of USTS programs and projects. To accomplish this, the Office analyzes and interprets available secondary information, conducts primary research studies to provide marketing and statistical information on the international travel market and engages in special research techniques designed to improve the overall coverage and quality of travel data.

The resulting information is available for use by the travel industry, as well as by USTS.

In addition, the Office is USTS' primary liaison with the appropriate U.S. Department of Commerce offices in matters pertaining to congressional committees and legislation and regulatory decisions related to travel and tourism. It prepares the USTS background reports and position papers for intergovernmental and international meetings dealing with tourism.

1973 STATISTICAL SUMMARY

Foreign visitor arrivals in the United States during 1973 totaled an estimated 14 million. Arrivals from overseas countries (countries not contiguous to the USA) numbered 3.5 million, a 6.9 per cent increase over 1972.

Canadian visitors to the USA in 1973 numbered approximately 8.8 million, a 0.1 per cent decrease from 1972. Arrivals from Mexico totaled 1,619,451 during 1973, a 17.6 per cent increase over 1972.

The number one supplier of overseas visitors to the U.S. in 1973 was Japan with 638,330 visitors—an increase of 53.1 per cent over 1972. The United Kingdom was the source of the second largest volume of overseas visitors with 479,357 arrivals, a 23.3 per cent increase over 1972. The third largest supplier of overseas visitors was Germany, followed by France and Italy.

During 1973, business visitors from overseas countries numbered 500,426 (9.7 per cent of the total overseas visitors), while pleasure visitors numbered 4,344,095 (84.4 per cent of the total), students numbered 103,702 (2.0 per cent of the total), and transits numbered 198,217 (3.9 per cent of the total). Ninety-seven per cent of the visitors from Mexico came for pleasure in 1973.

Estimated 1973 receipts (including transportation) from foreign visitors were \$3.9 billion, an increase of 22 per cent over the \$3.2 billion receipts in 1972. U.S. citizens' expenditures for foreign travel during 1973 are estimated at \$6.9 billion, a 7.8 per cent increase over the \$6.4 billion spent in 1972.

The travel gap in the balance of payments, i.e., the difference between what Americans spent abroad and what foreigners spent in the USA, is estimated to have decreased 6.2 per cent over last year, from \$3.2 billion in 1972 to about \$3.0 billion in 1973.

The following USTS research reports are available from the Office of Research and Analysis.

Highlights of a Study of British Travel Habits and Patterns

September 1972

This paper highlights the findings of a survey conducted among residents of the United Kingdom during the winter of 1971-1972 to determine the incidence of international travel in the population as well as the characteristics, travel attitudes, preferences and patterns of British international travelers. A three-stage area cluster probability sample was used to randomly select adults 18 years of age and over residing in England, Wales and Scotland. Demographic data and incidence of travel in the general population (by long-distance, short-distance and domestic travelers) was based on 11,954 interviews. Data on characteristics of trips to the USA, as well as general attitudes and preferences for international travel were based on 1,836 interviews.

Travel Patterns of Foreign Visitor Arrivals (I-95 Analysis)

This is an annual report which consists of four summary tables which provide marketing information on characteristics and travel patterns of visitors from 152 metropolitan areas in 24 key tourist-generating countries. The tables presented indicate purpose of trip, median length of stay, age, flag of carrier,

country of embarkation, port of U.S. entry and departure and first destination in the U.S. The statistics found in Table 1 are based on a random sample of all Forms I-95 stratified by country. Statistics in Tables 2 and 3 are based more on a quota sample which enable the samples for the individual cities to be of sufficient size to analyze the specified factors. The actual sample sizes for each country and city are found on the respective tables.

Summary and Analysis of International Travel to the United States

This monthly report includes statistics on visitor arrivals to the USA and market analysis of international travel by residents of foreign countries. In addition, each month a different tourist country is analyzed in terms of the traveling characteristics of its nationals. The report is based on secondary data sources and an analysis of Government entry form I-95. (Monthly reports are available beginning with the January 1970 edition.)

Arrivals and Departures by Selected Ports

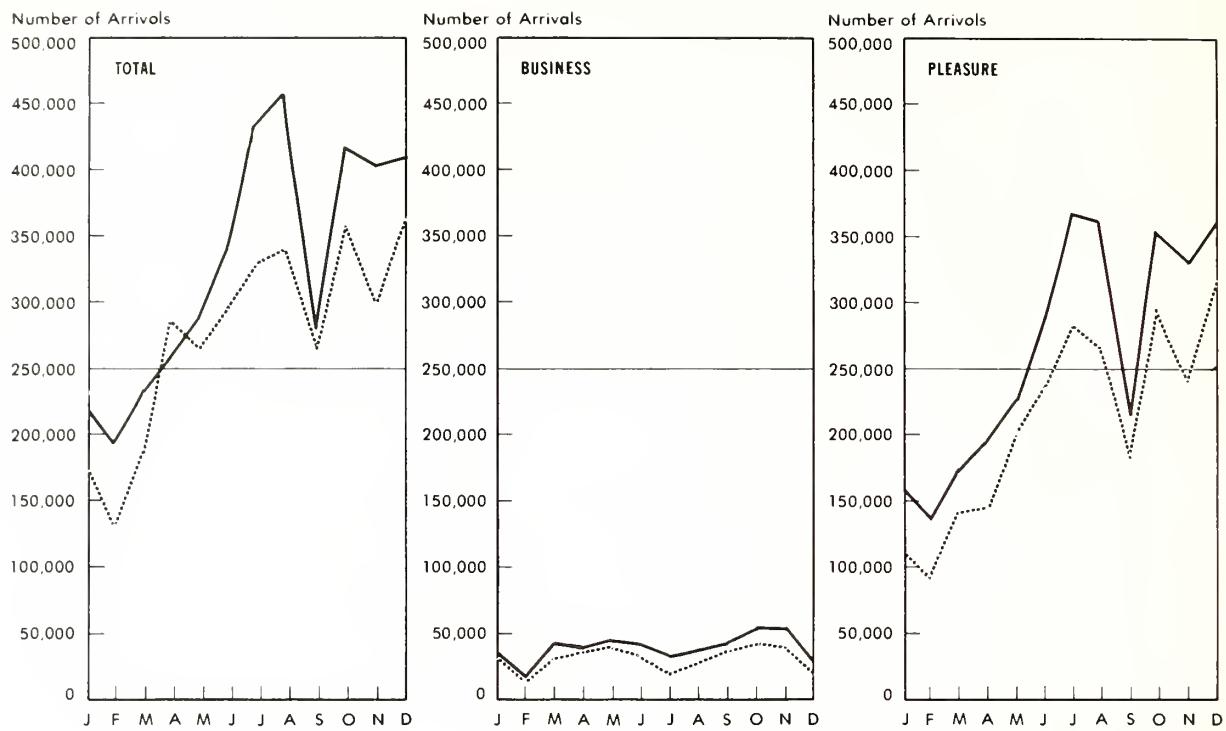
This annual publication includes tables and an interpretative analysis of foreign visitors by their country of residence, port of entry and purpose of trip, as well as providing data on Americans traveling abroad by flag of carrier and country of debarkation. All tables were developed from Government entry forms (I-94) and U.S. passenger departures (I-92). This series began in 1969.

Foreign Visitor Arrivals: 1962-1972

This 2-page leaflet contains a 10-year history of travel to the U.S. by country of permanent residence from 1962-

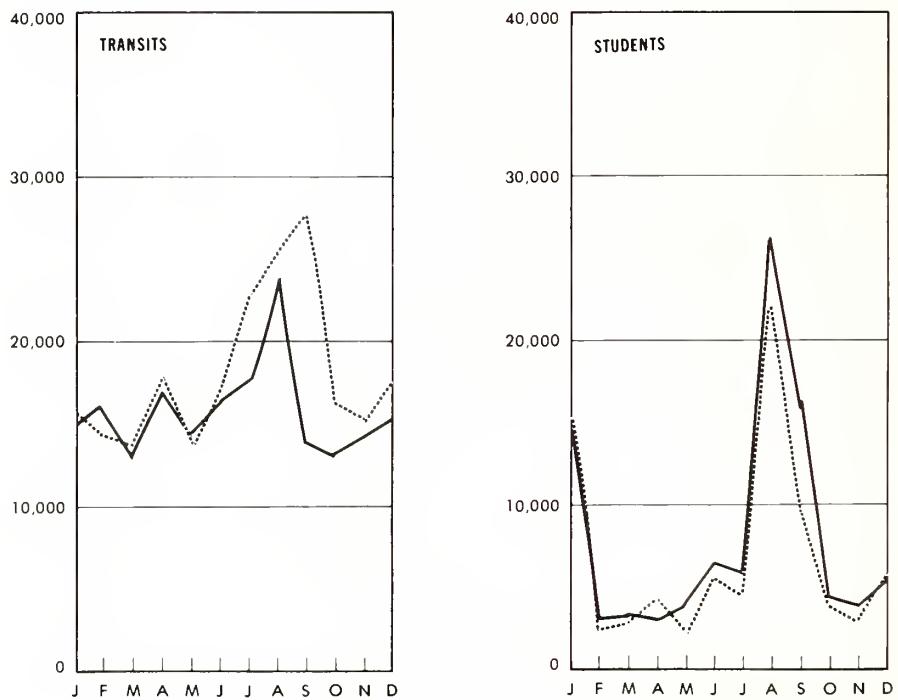
Top 10 Overseas Tourist Generating Countries Calendar Years 1973 and 1972

Country	Calendar Year 1973		Calendar Year 1972		1973 Share of Total Overseas	1972 Share of Total Overseas
	Rank	Number of Arrivals	Rank	Number of Arrivals	Percent Change	
Japan	01	638,330	01	417,048	53.1	18.1
U.K.	02	479,357	02	388,710	23.3	13.6
Germany	03	331,922	03	237,329	39.9	9.4
France	04	189,385	04	155,348	21.9	5.4
Italy	05	119,595	05	111,460	7.3	3.4
Australia	06	109,160	07	89,626	21.8	3.1
Bahamas	07	103,594	06	103,607	0.0	2.9
Venezuela	08	80,647	08	71,711	12.5	2.3
Brazil	09	78,522	12	54,755	43.4	2.2
Netherlands	10	73,468	10	62,196	18.1	2.1



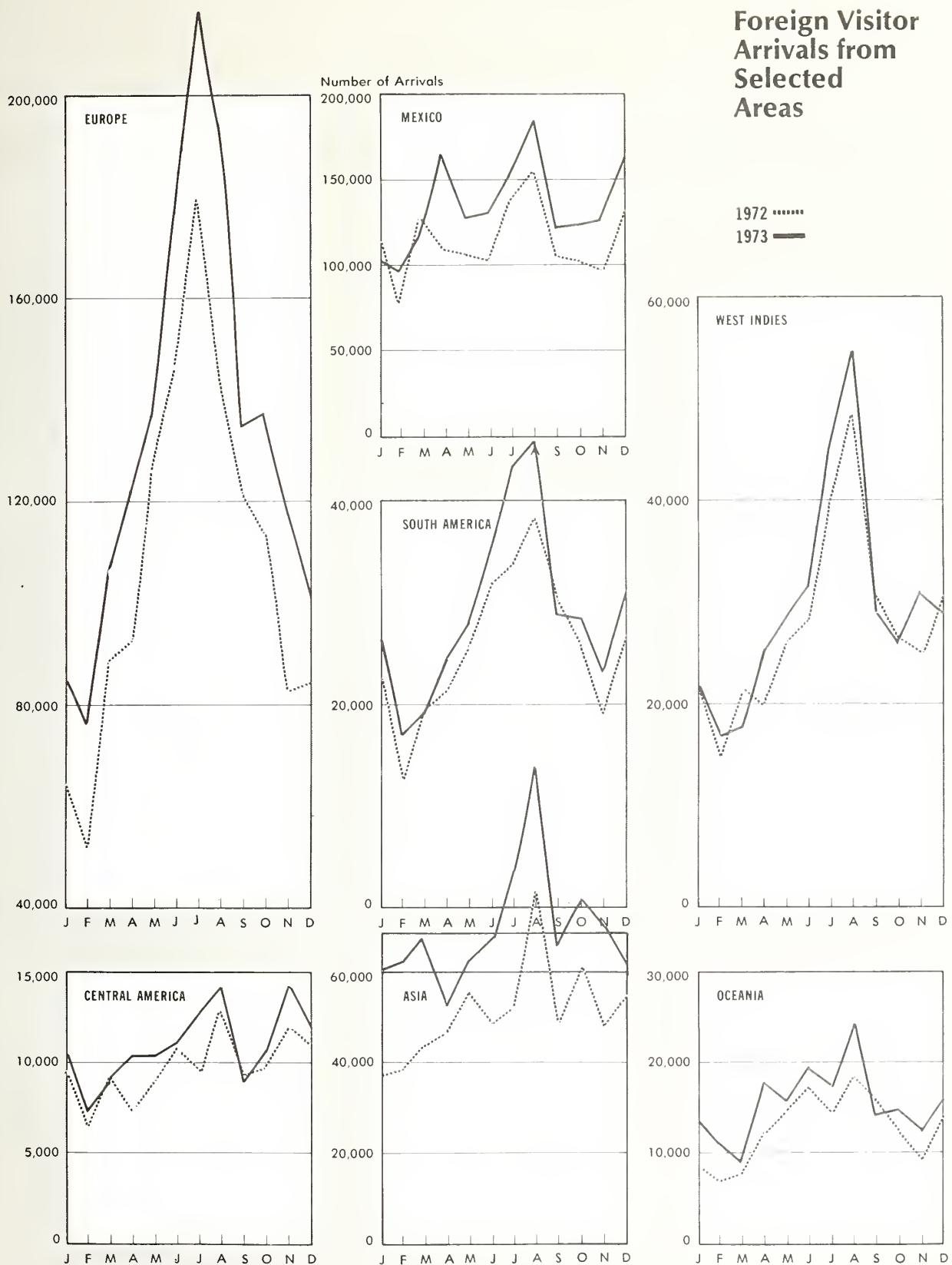
Overseas Arrivals by Purpose of Trip

1972
1973 —



Foreign Visitor Arrivals from Selected Areas

1972
1973 —



U.S. Share of Total International Travel Market Visitors and Dollars 1960—1973

Year	Total International Travel				International Travel to the United States				U.S. Share of International Travel	
	International Tourist Arrivals in Millions ^a	% Change Prev. Yr.	International Tourist Receipts in Billions ^b	% Change Prev. Yr.	Arrivals in the U.S. in Millions	% Change Prev. Yr.	U.S. Travel Receipts in Millions	% Change Prev. Yr.	Share of Total Number	Share of Total Dollars
1960	71.2	..	\$ 6.8	..	5.6	..	\$1,025	..	7.8%	15.1%
1961	75.3	+ 5.8%	7.3	+ 7.4%	6.3	+13.9%	1,057	+ 3.1%	8.4	14.5
1962	81.4	+ 8.1	7.8	+ 6.9	5.9	+ 6.8	1,070	+ 1.2	7.2	13.4
1963	93.0	+14.3	8.3	+ 6.4	6.1	+ 3.8	1,133	+ 5.9	6.6	12.9
1964	108.0	+16.1	9.6	+15.7	6.6	+ 8.1	1,357	+19.8	6.1	13.6
1965	115.5	+ 6.9	11.0	+14.6	7.8	+19.0	1,545	+13.9	6.8	13.8
1966	130.8	+13.3	12.5	+13.6	9.0	+15.5	1,785	+15.5	6.9	14.1
1967	139.7	+ 6.7	13.4	+ 7.2	9.6	+ 5.8	1,881	+ 5.4	6.9	13.9
1968(r)	139.7	+ 0.1	13.8	+ 3.0	10.9	+13.7	2,035	+ 8.2	7.8	14.5
1969	154.1	+10.3	15.4	+11.6	12.5	+15.1	2,361	+16.0	8.1	15.2
1970	169.0	+ 9.7	17.9	+16.2	13.2	+ 5.9	2,696	+14.2	7.8	15.1
1971	181.0	+ 7.1	19.9	+11.2	13.7	+ 3.6	2,882	+ 6.9	7.6	14.5
1972(e) ^c	198.0	+ 9.4	25.0	+25.6	13.1	— 4.4	3,200	+11.0	7.7	12.8
1973(e)	215.0	+ 9.0	28.0	+12.0	14.0	+ 6.8	3,900	+21.9	6.5	13.9

(e) = estimates

(r) = revised figure

^a Based on statistics of international tourist arrivals at frontiers or in accommodation reported on a regular basis to the IUOTO Secretariat.

^b Excluding international fare payments. Based on international tourist receipts statistics reported on a regular basis to the IUOTO Secretariat.

^c The Canadian arrival figures for 1971 and 1972 cannot be compared because a different method of collecting the 1972 statistics was implemented. Local bus traffic, previously excluded (considered daily travel), is now included in the 1972 bus figures. In 1971, the figures included crews of planes, buses, trains, boats and commercial trucks which are excluded in 1972.

Source: United States Travel Service based on data from the International Union of Official Travel Organizations, *Economic Review of World Tourism*, 1972 Edition.

U.S. Travel Receipts and Expenditures 1960—1973

Year	Tourism Receipts and Expenditures Including Transportation			Tourism Receipts and Expenditures Excluding Transportation				
	Receipts	% Change Prev. Yr.	Expenditures	% Change Prev. Yr.	Receipts (Millions of Dollars)	% Change Prev. Yr.	Expenditures	% Change Prev. Yr.
1960	\$ 981	..	\$2,263	—	\$ 919	..	\$1,750	..
1961	995	+ 1.4%	2,292	+ 1.3	947	+ 3.1	1,785	+ 2.0
1962	,070	+ 7.5	2,514	+ 9.7	957	+ 1.1	1,939	+ 8.6
1963	1,133	+ 5.9	2,729	+ 8.6	1,015	+ 6.1	2,114	+ 4.6
1964	1,357	+19.8	2,856	+ 4.7	1,207	+18.9	2,211	+ 4.6
1965	1,545	+13.9	3,158	+10.6	1,380	+14.3	2,438	+10.3
1966	1,790	+15.9	3,412	+ 8.0	1,590	+15.2	2,657	+ 9.0
1967	1,88	+ 5.1	4,025	+18.0	1,646	+ 3.5	3,195	+20.3
1968	2,035	+ 8.2	3,907	— 2.9	1,775	+ 7.8	3,022	— 5.4
1969	2,361	+16.0	4,470	+14.4	2,058	+15.9	3,390	+12.2
1970	2,696	+14.2	5,168	+15.6	2,319	+12.7	3,953	+16.6
1971	2,882	+ 6.9	5,558	+ 7.6	2,457	+ 6.0	4,294	+ 8.6
1972	3,200	+11.0	6,436	+15.6	2,706	+19.8	4,856	+13.5
1973*	3,900	+21.9	6,900	+ 7.2	3,300	+22.0	5,300	+ 9.1

* Unofficial USTS estimate.

Source: United States Travel Service based on data of the Bureau of Economic Analysis, U.S. Department of Commerce.

1972. It also provides the per cent change in the number of visitors for each of these years during the ten-year period.

Tourism and the Balance of Payments (February 1972)

This report contains documentation on international tourism and its significance for the U.S. balance of payments. The reports contain a series of tables and graphs highlighting the trend in U.S. travel expenditures and receipts, compares budgets of national government tourist offices and discusses some possible remedies.

Market Potential Index

This report provides a conceptual framework to delineate factors which help to explain the variation in travel to the USA from selected countries. Through a series of index numbers, this model ranks countries in terms of their VISIT USA visitor potential.

Inventory of Federal Tourism Programs

This report provides information on the number of Federal agency participations in the travel/recreation area and indicates the nature and character of the participation.

Evaluation of Specific Promotion Projects

From December 1971 to March 1972, personal interviews were conducted with 500 individuals who toured the VISIT USA EXHIBIT in Mexico City to measure public attitudes towards the USTS exhibit, to obtain information about the travel behavior of persons who toured the exhibit, to measure demographic characteristics of persons attending the exhibit, and to measure perceptions of advertising relating to touring the United States.

From April 1972 to June 1972, personal interviews were conducted with 334 individuals who toured the VISIT USA EXHIBIT in Guadalajara, Mexico, to measure attitudes toward the United States, both before and after viewing the movie; to measure attitudes of those attending the movie, particularly as it related to visiting the United States; to measure demographic characteristics of the viewing audience; and to obtain names and addresses of sample respondents to be used in a follow-up study measuring travel behavior several months after the movie.

An analysis was made of the VISIT USA World Tourism Seminars held

from October 1971 through April 1972, which were held in Caracas, Venezuela; Sao Paulo, Brazil; Lima, Peru; Buenos Aires, Argentina; Paris, France; West Berlin, Germany; Zurich, Switzerland; Mexico City, Mexico; London, England; Rome, Italy; and Madrid, Spain. U.S. travel industry executives met with approximately 750 foreign tour operators and travel agents to learn more about various international travel markets in order to determine how best to package and promote the U.S. as a tourist destination.

An analysis was made of the VISIT USA Familiarization Tours; Colorado Year-Around (August 1971), Colorado Ski (December 1971), and Japanese Familiarization Tour of the West (June 1972). Foreign travel agents met with American travel industry executives to obtain information on the U.S.; to see parts of the United States; to make personal contacts and to exchange ideas on problems and methods of promoting VISIT USA travel.

An analysis was made of the Fourth Annual Discover America Pow-Wow and Travel Mart held in San Diego, California, in September 1972. The mart was attended by 241 foreign tour operators, representing 44 countries, 12 foreign-flag carriers, 122 U.S. commercial firms and 41 U.S. destination areas. (Total attendance—416 organizations and 561 people.)

A similar analysis of the Fifth Annual Pow-Wow in Tucson, Arizona, will be available in January 1974. •

Study of French Travel Habits and Patterns

This report is based on an exploratory study conducted in October 1973 compiling secondary data and information gained through personal interviews with 42 organizations and individuals in or related to the travel industry. The report attempts to discern the character and direction of the developing tourism industry, with special reference to (1) developing patterns of industry structure; (2) public receptivity to mass travel; and (3) developing patterns of large scale long-haul tourism and its implications for the U.S. travel market.

U.S. International Airline Industry Implications for Travel Development

This report examines and analyzes the current state of the international passenger air transportation industry and its recent developments, with specific emphasis on those issues most relevant to the development of international tourism, and particularly, overseas foreign visitor inflows to the U.S.

The following USTS research reports are available from National Technical Information Services, 5285 Port Royal Road, Springfield, Virginia 22151.

A Study of Mexican Travel Habits and Patterns, March 1971.

This report analyzed the findings from a national probability sample of 4,000 Mexican residents with respect to their travel patterns, both in general and in specific reference to the United States, attitudes towards and images of the United States as a travel destination, demographic and trip characteristics.

A Study of British Travel Habits and Patterns (Volume 1)

November 1971

This report is based on an exploratory study assimilating secondary data and information received from personal interviews with 42 individuals representing 38 organizations of the British travel trade. The report provides information on (1) the structure and travel patterns of the British foreign travel market, (2) the various traveling segments within the market, (3) the role of the carriers and the producing industry, and (4) specific data vis-a-vis the USA as a travel destination.

The following USTS research report is available from the Superintendent of Documents, U.S. Government Printing Office, Washington, D. C. 20204.

A Study of Japanese Travel Habits and Patterns

October 1972

This report, the first phase of a comprehensive study investigating the Japanese travel market, is based on extensive in-depth interviews with 34 individuals representing 26 companies and organizations involved in travel in Japan during the month of July 1972. The report provides information on, (1) the social expenditure patterns and the geographical source structure of the market, (2) the principal segments of the market and their relative potential for the future, (3) the structure of the sales function in the travel industry, as between wholesalers and retailers of travel, (4) the role and contribution of the carriers, (5) the effects of dollar devaluation, (6) patterns of destinations and the competition perceived to exist among them, and (7) resumes of existing studies in the field.

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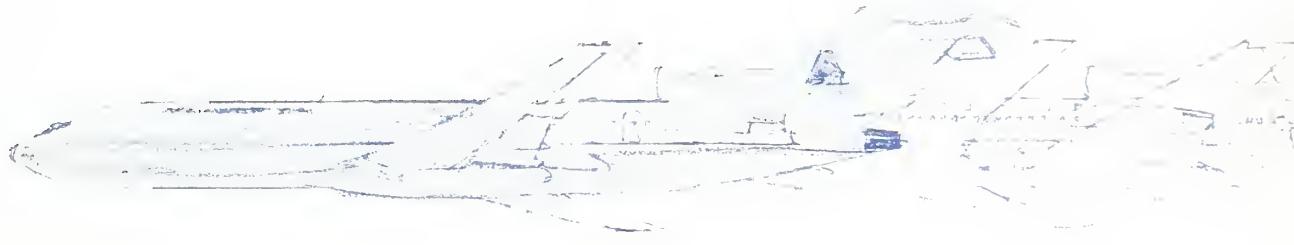
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